

# CCC® Claim Management Dashboard

## Introduction

This job aid describes how use the **CCC® Claim Management Dashboard**. The Claims Management Dashboard provides a real-time, comprehensive view of a Company's assignments across all stages of the claim lifecycle. This can be leveraged by management to view an overall performance to take proactive steps to better handle inbound and existing claim volume.

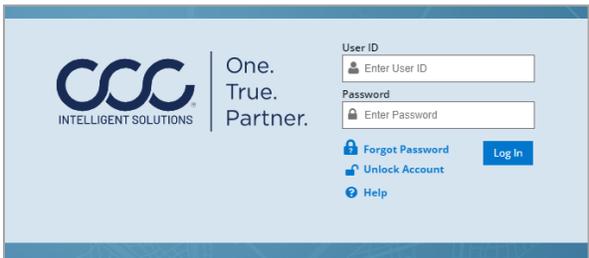
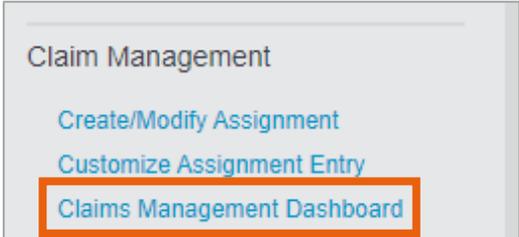
### This job aid discusses:

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Access the Dashboard	1
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**Note:** Appropriate user role/permission is required to access this dashboard.

## Access Dashboard

Follow the steps in the table below to access the CCC Claim Management Dashboard:

Step	Action
1	<p>Login to the <b>CCC Portal</b>.</p> 
2	<p>Select the <b>Claim Management Dashboard</b> under the Claims Management section. The Claims Management Dashboard opens.</p> 

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# CCC® Claim Management Dashboard, Continued

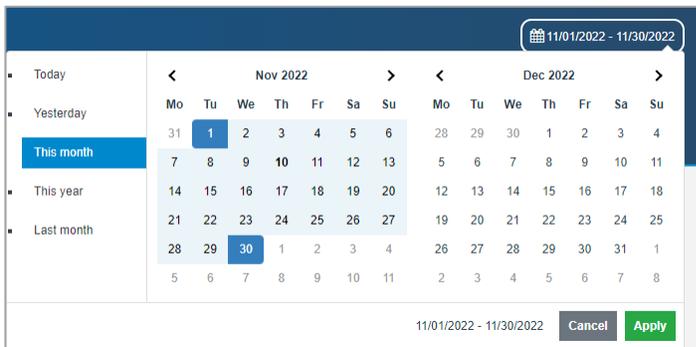
## Dashboard Navigation

Review the areas below for a description of the Claims Management Dashboard navigation.

## Date Filtering

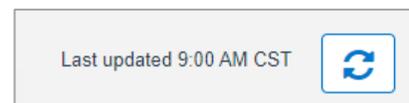
Click the date range icon to adjust the date range selected. The default range is 7 days, and the maximum selectable date range is 30 days. You have the option to select date ranges 180 days in the past.

Part	Function
Today	Selects only today's date to display in the results.
Yesterday	Selects only yesterday's date to display in the results.
This month	Selects the current month's date range to display in the results.
This year	Selects the current year's date range to display in the results.
Last month	Selects the last month's date range to display in the results.
Cancel	Closes the date range pop-up and removes any selection made.
Apply	Applies the selected date range to the dashboard.



## Refresh

Click the **refresh** icon to update the dashboard. The time last updated will appear next to the refresh icon.



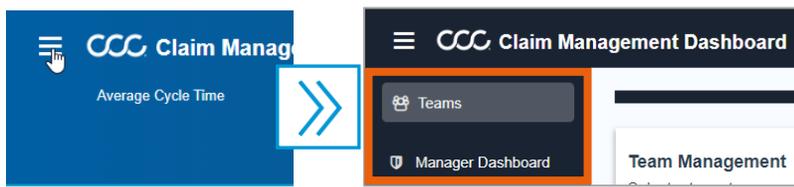
## Results per Page

Select the number of results to appear on each page of the dashboard. Use the arrows to switch between pages or use the dropdown to select a page to view.



## Access Teams Area

Select the **menu** icon to open the **left side** panel to access the Teams area.



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## CCC® Claim Management Dashboard, Continued

### Total Loss

Below is an overview of **Top-Level Metrics**. **Note:** Click the date range icon to adjust the date range selected. The default range is 7 days, and the maximum selectable date range is 30 days. You have the option to select date ranges 180 days in the past.

The Total Loss tab shows data aggregated at a Company or Team level with the ability to drill down to an individual team member.

The **Total Loss** tab shows data aggregated at a **Company** level.

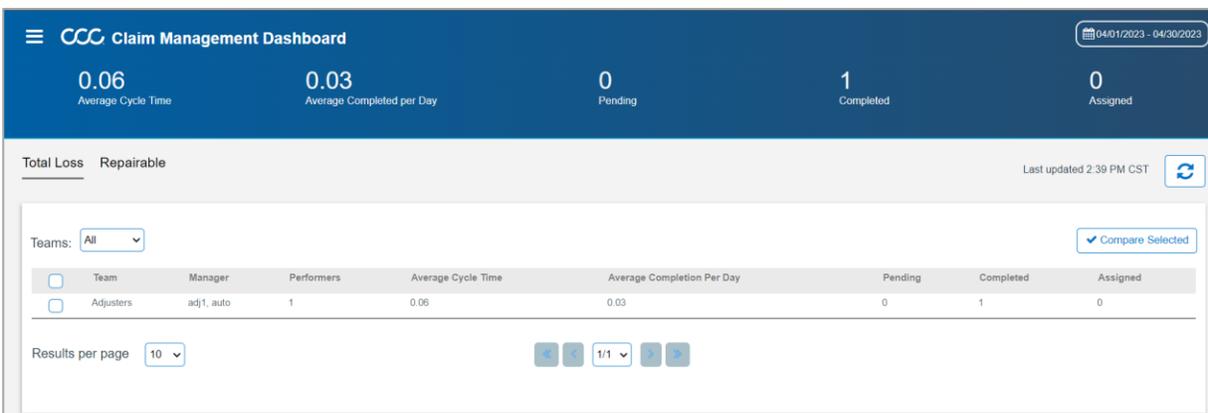
To drill down the data:

- Select a Team from the **Teams** dropdown to show only adjusters on that team.
- Select an Adjuster from the **Performers** dropdown to show all the Dispatch Types associated to the adjuster.



Top level data shows:

- **Average Cycle Time:** Average Number of Days from the Total loss confirmed time to when a claim was settled (Settlement Agreed time).
- **Average Completed Per Day:** # of Claims Completed in Date range/ Date Range.
- **Pending:** Total loss claim status any value other than total loss confirmed or settlement agreed and assigned to an appraiser.
- **Completed:** Settlement has been agreed upon.
- **Assigned:** Total loss status confirmed assigned to an appraiser.



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## CCC® Claim Management Dashboard, Continued

**Repairable** Below is an overview of **Top-Level Metrics**. **Note:** Click the date range icon to adjust the date range selected. The default range is 7 days, and the maximum selectable date range is 30 days. You have the option to select date ranges 180 days in the past.

The **Repairable** tab shows data aggregated at a state level.

To adjust the data displayed:

- Select the **Proximity** dropdown to change the Proximity displayed.

Top level data shows:

- **SLO (Service Level Objective):** Volume of assignment (% of assignments assigned to field appraiser).
- **Tasks out of SLO:** Total number of Pending.
- **Total Tasks:** Sum of Assigned and Pending Claims.
- **Unspecified State:** State unknown on claim.

Repairable data for table shows:

- **# to Meet SLO %:** # of missing assigned claims to be assigned that would get state to 75%.
- **Average Cycle Time:** Days between claim assigned to completed.
- **Average Completion Per Day:** Total number of claims completed / Number of days in the date range.
- **Pending:** Assigned to a Drip Bucket (Not assigned to a human) and not manually assigned previously.
- **Assigned:** Assigned to a human reinspection status of not complete (Started, Assigned, Report Complete).
- **Completed:** Reinspection status complete.

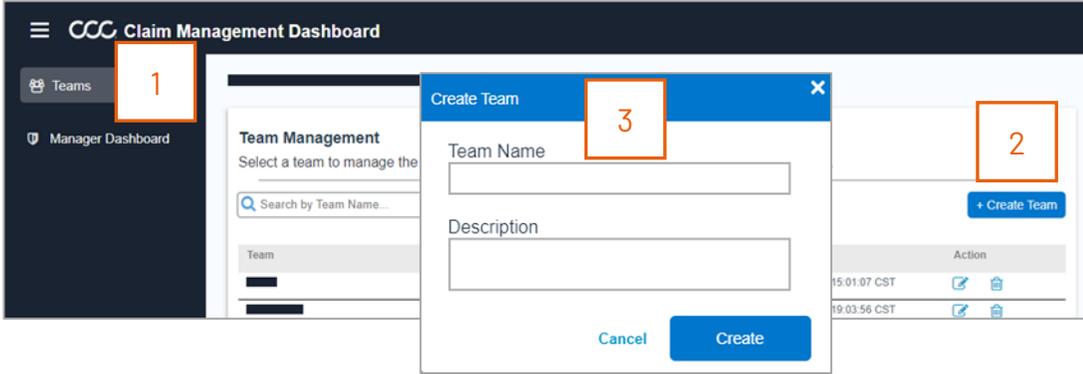
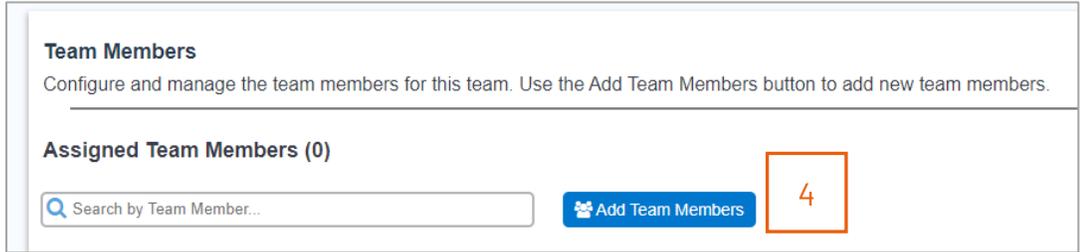
The screenshot displays the CCC Claim Management Dashboard. At the top, there is a navigation bar with the CCC logo and the text 'Claim Management Dashboard'. A date range selector shows '11/21/2022 - 11/21/2022'. Below the navigation bar, four key metrics are shown: 'NaN % SLO%', '0 Tasks Out Of SLO', '0 Total Tasks', and '0 Unspecified State'. The main content area features a table with columns for 'Alert', 'State', 'To Meet SLO %', 'Average Cycle Time', 'Average Completion Per Day', 'Pending', 'Completed', and 'Assigned'. A 'Proximity' dropdown menu is highlighted with a red box, showing 'All' selected. The table contains five rows of data for different states: New York, Illinois, Minnesota, California, and Virginia. At the bottom of the table, there is a 'Results per page' dropdown set to '10' and a pagination control showing '1/1'.

Alert	State	To Meet SLO %	Average Cycle Time	Average Completion Per Day	Pending	Completed	Assigned
false	New York	100.0 %	1.00	0.00	0	1	0
false	Illinois	100.0 %	0.67	0.00	0	3	0
false	Minnesota	100.0 %	1.00	0.00	0	1	0
false	California	100.0 %	0.67	0.00	0	3	0
false	Virginia	100.0 %	1.00	0.00	0	1	0

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## CCC® Claim Management Dashboard, Continued

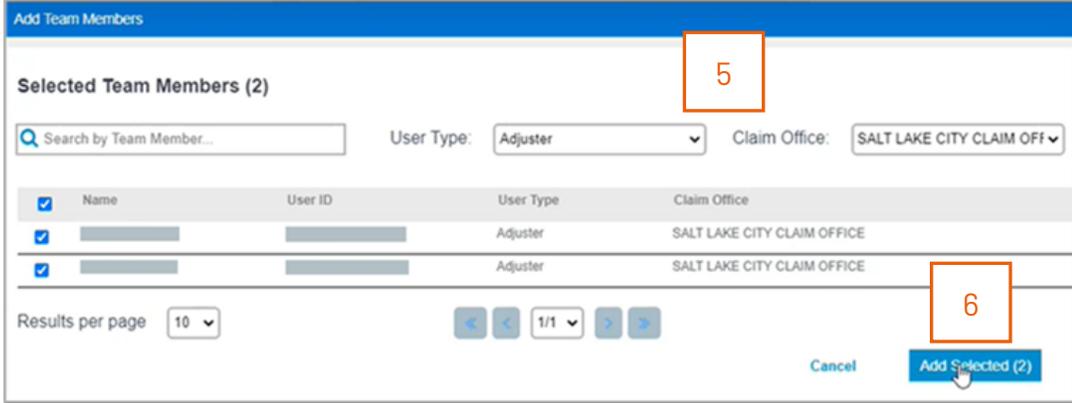
**Create Team** To create a team, follow the steps below starting from the CCC Claim Management Dashboard teams area:

Step	Action
1	Click the <b>Team</b> dashboard.
2	Click <b>Create Team</b> . The Create Team pop up opens.
3	Enter a <b>Team Name</b> and <b>Description</b> , then click <b>Create</b> . The configuration page for the newly created team opens. 
4	Click <b>Add Team Members</b> , the Add Team Members page opens. 

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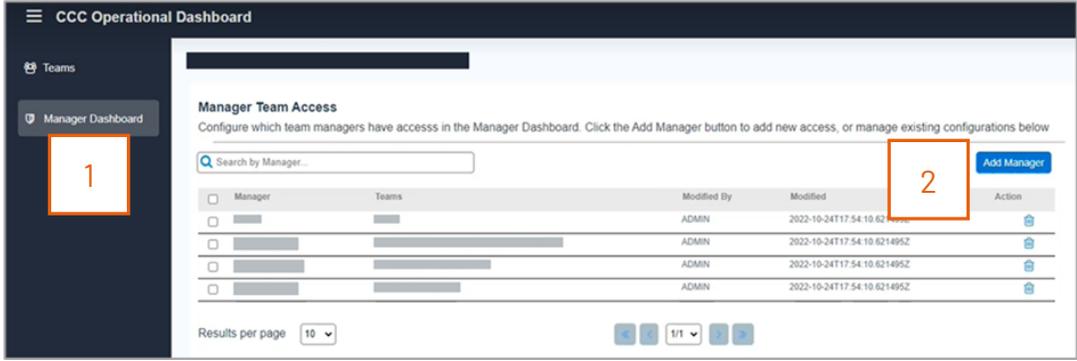
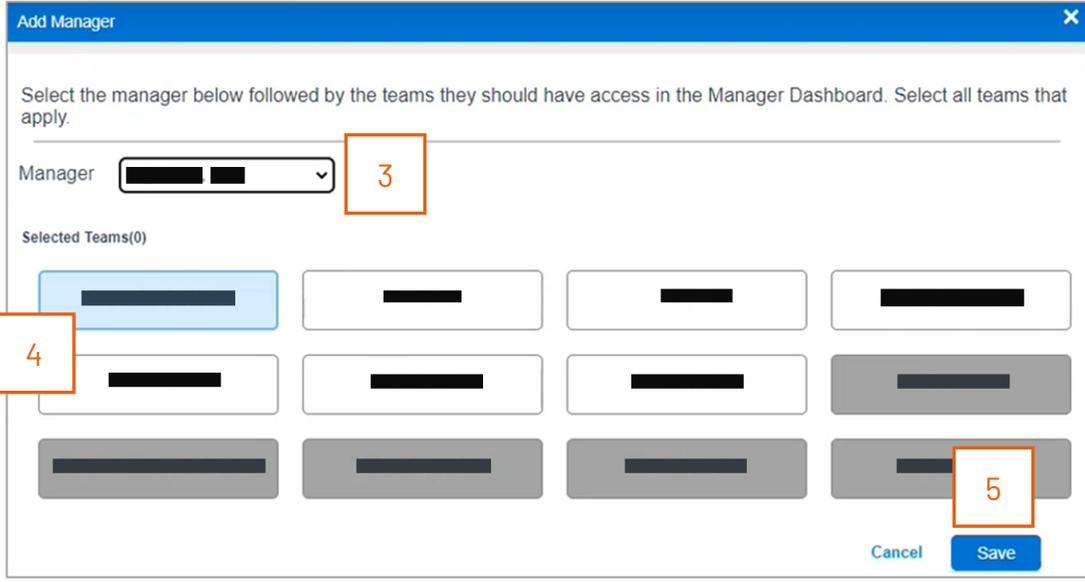
## CCC® Claim Management Dashboard, Continued

### Create Team, continued

Step	Action
5	Filter by <b>User Type</b> and <b>Claim Office</b> for the table to populate. Then add the desired team members, select the <b>checkboxes</b> next to the desired team members.
6	<p>Click <b>Add Selected</b>, when complete. A message will appear indicating the 'Team members successfully added'.</p> 

# CCC® Claim Management Dashboard, Continued

**Add Manager** To add a manager, follow the steps below starting from the CCC Claim Management Dashboard teams area:

Step	Action
1	Select <b>Manager Dashboard</b> .
2	Select <b>Add Manager</b> . 
3	Select the <b>Manager</b> from the dropdown.
4	Select the <b>Teams</b> to associate with the manager.
5	Click <b>Save</b> , when finished. 

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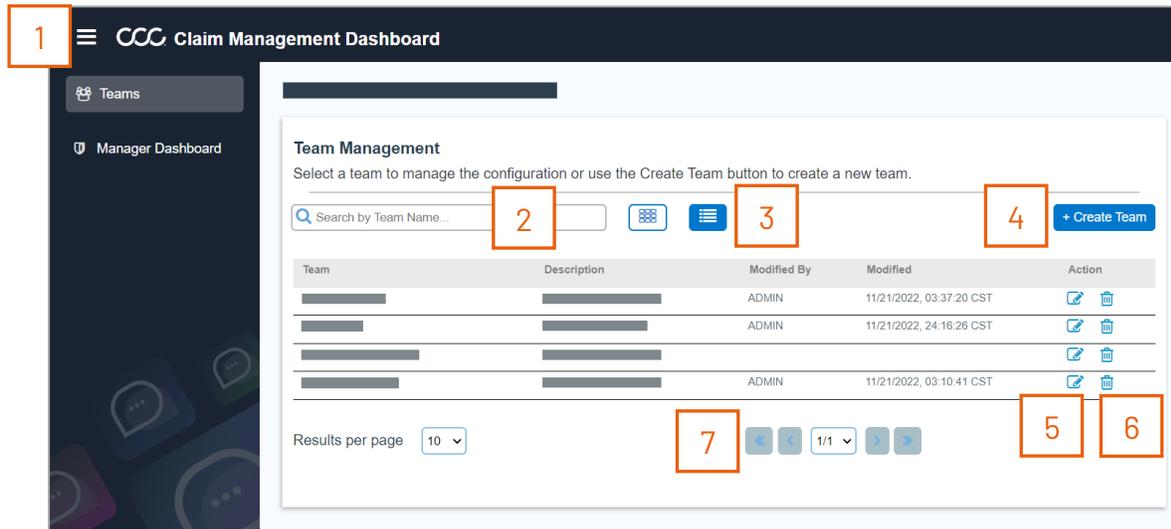
## CCC® Claim Management Dashboard, Continued

**Configuration** Review the **Team** and **Manager Dashboard Configuration** sections for a description of the initial set up of the CCC Claim Management Dashboard.

**Important:** Users can only be on one team and managers can only be managers of a lower-level user.

**Team Configuration** The table below provides a description of the Team Configuration options:

#	Part	Description
1	Profile Icon	Takes users from the <b>Team Management</b> screen back to the <b>Claim Management Dashboard</b> screen.
2	Search Field	Allows users to search for teams.
3	Change View Icons	Allows users to change their view from a bullet list of teams to <b>Team Name</b> and <b>Description</b> .
4	Create Team Button	Allows users to <b>Create</b> a new team.
5	Pencil Icon	Allows users to <b>Edit</b> a team.
6	Trash Can Icon	Allows users to <b>Delete</b> a team.
7	Results Per Page	Allows users to change the number of results that appear on each page.



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# CCC® Claim Management Dashboard, Continued

## Team Configuration, continued

### Edit/Add Team Member Options:

#	Part	Description
1	Search Box	Allows users to search for team member names in the current box.
2	Add Team Members	Allows users to <b>Add</b> team members.
3	Check Box	Allows users to select multiple users to be deleted.
4	Trash Icon	Allows users to <b>Remove</b> users from a team once selected with checkbox. <span style="float: right; border: 1px solid blue; border-radius: 5px; padding: 2px 5px;">Remove Selected (1)</span>

The screenshot displays the 'Team Configuration' interface. On the left sidebar, there are navigation options for 'Teams' and 'Manager Dashboard'. The main area shows a 'Creating appraiser team' section. Below this, the 'Team Members' section provides instructions on how to manage team members. The 'Assigned Team Members (2)' section features a search box (1) and an 'Add Team Members' button (2). A table below lists two assigned members, each with a checkbox (3) for selection. The table columns are Name, User ID, User Type, and Claim Office. At the bottom, there are pagination controls showing 'Results per page' set to 10 and a '1/1' page indicator.

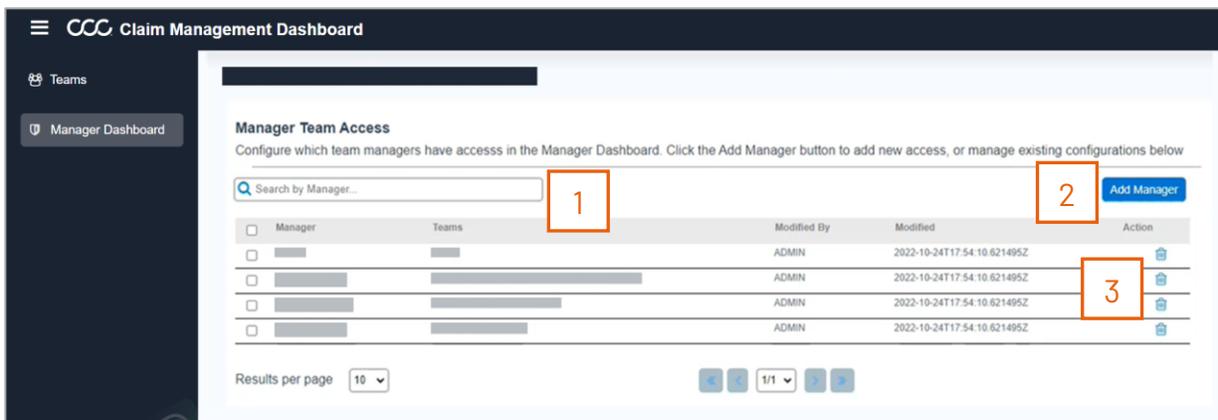
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## CCC® Claim Management Dashboard, Continued

### Manager Dashboard Configuration

The table below provides a description of the Manager Dashboard options:

#	Part	Description
1	Search Field	This field will allow users to search for managers.
2	Add Manager Access	This button will open the Add Manager popup allowing users to <b>Edit</b> managers access to teams.
3	Trash Icon	Allows users to <b>Delete</b> users from a team.



#	Part	Description
1	Manager Dropdown	Select the manager from the dropdown to add teams to.
2	Selected Teams	Teams in <b>Blue</b> are selected and/or on the managers team. Teams in <b>White</b> are available to be added to the managers team. Teams in <b>Gray</b> are unavailable to be added.

